



IV&V Monthly Assessment Report

Period Ending September 30, 2020

Appendix E – IV&V Spanish Translation Support Report

Puerto Rico Medicaid Program Eligibility & Enrollment (PREE)

Design, Development and Implementation (DDI) Phase

Contract Number: 2019-DS0572

Prepared for:

Puerto Rico Department of Health

Version 1.0

October 01, 2020

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Puerto Rico Department of Health

PREE DDI Phase

IV&V Spanish Translation Support Report – September 30, 2020



REVISION HISTORY

Version	Effective Date	Description of Changes	Prepared By	Reviewed by
1.0	10/01/20	Submission to client	Jim Tardella	Jim Tardella

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1 Introduction

NTT DATA Services had a deliverable in their Statement of Work (SOW) for the completion of the Center for Medicaid Services (CMS) Medicaid Eligibility and Enrollment Toolkit (MEET) Checklists, which would eventually lead to the Certification/Authority to Connect (ATC) for the Puerto Rico Eligibility & Enrollment (PREE) system. In March 2020, PREE leadership determined that Berry Dunn would conduct a Pilot for the new Outcomes Based Certification (OBC) method that will be utilized instead of the traditional certification activity for an Eligibility and Enrollment (E&E) system.

In light of this, PREE leadership agreed to “re-purpose” NTT DATA’s ‘Certification’ deliverable. This re-purposed deliverable contains the activities that NTT DATA supported in the following areas:

- Review of the PREE Training Materials
- Translation of the PREE Training Materials to Spanish
- Facilitation of the PREE Training Material Reviews
- Review of the PREE Training Plan

1.1 Purpose

This report presents the IV&V team’s (hereafter referred to as “IV&V”) assessment of the PREE Training Materials Spanish Translation tasks and activities conducted by RedMane. The approved PREE deliverable review process was utilized throughout the duration of this effort. Upon completion, the materials were reviewed and approved by the Puerto Rico Medicaid Program (PRMP) Subject Matter Expert’s (SME) Review Committee on 08/25/20.

This report is the mechanism for IV&V to communicate the document review status, findings and recommendations.



IV&V Finding – an area identified as a deficiency in the project where the vendor is not in compliance with their contractual commitments, Federal and Territory regulatory requirements, industry accepted standards, or PRDoH and PRMP policy and which requires action from the project team to address.



IV&V Recommendation – an opportunity for the project team to improve performance in a given area and may not be directly associated to a finding. It is up to the State or vendor to decide whether to act on the recommendation.

Section 4, IV&V Findings and Recommendations includes a complete list of new, open, and closed findings, as well as recommendations for the project.

1.2 Objective

This report documents associated observations, risks, and issues identified during the review process of the PREE Training Materials. The evaluation included recommendations to remediate risk and resolve issues. The assessment provides PRMP management with:

- An objective analysis of the PREE Training Materials development and review

- Improved and objective visibility into the quality of the review process of these deliverables
- Identified errors in delivered products and increased probability of PREE Training success

All content in the IV&V Spanish Translation deliverable is as-of the date specified in the report title page. Any content exceptions to this period will be noted in the report text.

1.3 Contributors

The contributors listed in Exhibit 1 participated in the review of the PREE Training Materials and included representation from the following vendors and stakeholders:

- PRMP – PREE Client
- Intervoice – Project Management Office (PMO)
- V2A Consulting – Organizational Change Management (OCM) and Training Vendor
- RedMane – System Integrator (SI)
- On-Point Solutions (OPS) – Training Support Vendor
- NTT DATA, LLC – IV&V Vendor

Exhibit 1: Contributors Table

Stakeholder	Organization
Luz Cruz, Medicaid Director	PRMP
Luis Gonzalez, Deputy Project Manager	PRMP
Raquel Ortega, SME	PRMP
Jesus Ayala, SME	PRMP
Joenelly Olmo, SME	PRMP
Marleen Perez, SME	PRMP
Greg Charles	Intervoice
Janeth Merchan	Intervoice
Paul Cohen	V2A
Carmen Denton	V2A
Adrian Perez	V2A
Monica Morales	IV&V
Marjorie Figueroa	IV&V
Carlos Cruz	IV&V
Bob Borneman	RedMane
Pui Leung	RedMane
Marilyn Edwards	RedMane
Carmen Torres	OPS

2 Executive Summary

This section summarizes IV&V's overall assessment of the PREE Training Materials Spanish Translation process efforts execution and monitoring. Specific data and analysis that support the contents of the Executive Summary are provided in Section 3 IV&V Spanish Translations Details, which includes Risks and Issues analysis, and Section 4 Recommendations.

The PREE Training Materials were initially prepared in English although most of the PRMP end-users are Spanish speaking. As a result, PRMP's Executive Leadership decided to have these materials translated to Spanish. Although an official decision was not logged in the PMO's Project Decision Log in SharePoint for this item, PRMP acknowledged that they would need additional support to facilitate and manage these translation activities. In March 2020, PRMP approached NTT DATA to solicit assistance in translating the PREE Training Materials to Spanish.

A review of the approved PREE baseline schedule revealed that the Training Materials translations activities were not scheduled to begin until after User Acceptance Testing (UAT) Tester Training occurred. Based on the schedule, having translation activities begin post UAT Tester Training would have caused a delay to the Project. With this decision made to begin translation activities, NTT DATA supported the Spanish translations efforts from April 2020 through August 2020. The following timeline reflects the actions taken.

- Provided PRMP with an initial approach/process to assist in the Spanish Translations efforts on 03/20/20.
- Discussed the draft approach/process with PRMP during our one-on-one Weekly Meeting on 03/25/20.
- Followed up with PRMP on 03/30/20 to confirm if the PREE Program Manager discussed the approach with the PRMP Director. NTT DATA had previously received a verbal approval for supporting the translation effort; however, written approval was being requested.
- Began reviewing all three waves of the PREE Training Materials on 04/06/20.
- Met with the PRMP Medicaid Director on 04/17/20 to discuss proposed support for the Translations efforts, as written approval of the proposal had not been received from PRMP.
- Followed up with the PRMP Medicaid Director on 06/17/20 regarding the written approval of the proposed approach.
- Received acknowledgement from the PRMP Medicaid Director on 07/02/20 to support the PREE Training Translation Support efforts.

Exhibit 2 summarizes IV&V's assessment of the PREE Training Materials Spanish Translations.

Exhibit 2: IV&V Assessment Dashboard

Project Phase	IV&V Assessment Summary
Overall Translation Process	<ul style="list-style-type: none">• NTT DATA developed the initial Training Material translation process, which was shared and reviewed with PRMP, the PMO, RedMane, and OPS. Over the course of the review efforts, process modifications were made to better suit the overall tasks and activities.

Project Phase	IV&V Assessment Summary
	<ul style="list-style-type: none"> • The review of the PREE Training Materials for all three Waves began on 04/06/20. • The initial review of the training materials showed improper Spanish translation had been used by OPS. It appeared that the training materials were translated utilizing a translation software, such as Google Translate. • Some of the key observations of the review were as follows: <ul style="list-style-type: none"> ▪ Sentences lacked proper Spanish syntaxes ▪ Words were not appropriately used when compared to Puerto Rico's Spanish terminology. ▪ Many of the PRMP/PREE terminology was incorrectly translated. • IV&V, V2A, and PMO recommended that PRMP return all of the PREE Training Materials to RedMane and OPS for revisions and to provide a higher quality of Spanish translation. • The revisions to the PREE Training Materials were submitted in May 2020. The new completion date for all review and comment resolution was 08/03/20. • IV&V, the PMO, and V2A implemented an efficient review process that allowed PRMP to concentrate only on reviewing important training business processes based on system functionality. • Two weekly status meetings were held to review, discuss and update comments and Training Materials through 08/03/20. At these meetings, RedMane and OPS provided PRMP with answers to their comments and concerns. • During this second review, the Training Materials appeared to have a higher quality of translation; however, areas still lacked proper syntaxes and grammar errors were identified. In a combined effort among IV&V, the PMO, and V2A, all materials were reviewed for translation, syntaxes and grammar first, and then reviewed by PRMP for business process and design. • With this review process in place, the review of the PREE training materials remained ahead of schedule and did not encounter any major issues or delays. • All PREE Training Materials for the three Waves were reviewed on time and delivered on their scheduled due date of 08/03/20. PRMP approved the PREE Training Material Spanish translations on 08/25/20.
Resources	<ul style="list-style-type: none"> • PRMP's request for IV&V to assist in the Spanish Translations was due to PRMP's limited pool of resources to complete these tasks in a timely manner. IV&V risk #44 was submitted to track and manage this. • PRMP's lack of resources was a constant risk to the review of the Training Materials. The same resources were used for the Citizen Portal Joint Application Design (JAD) sessions and the

Project Phase	IV&V Assessment Summary
	<p>management of online application processing during the COVID-19 pandemic.</p> <ul style="list-style-type: none"> PRMP's subject matter experts (SMEs) divided their schedule to be able to attend Citizen Portal JAD sessions in the morning and work on the review of the Training Materials in the afternoon. A joint effort was implemented by IV&V, the PMO, and V2A to help PRMP with the review of the Training Materials. Vendors focused on the review of the Spanish translation, while PRMP focused on the review of business processes and design.
Schedule	<ul style="list-style-type: none"> The COVID-19 pandemic and Puerto Rico's Governor's 'Stay at Home' order threatened the PREE Training Materials review schedule. PRMP's SMEs did not have the authority or the technology to perform their review from home. Once PRMP provided remote work protocols, internet, and computers for PREE SMEs, the review schedule was back on track and continued to stay on schedule for the due date of 08/03/20. The original PREE implementation date of October 2020 was impacted when PRMP made the decision to return all of the PREE Training Materials to RedMane and OPS for revisions. RedMane provided a new project schedule to accommodate the revised review cycle; however, it still impacted the User Acceptance Testing (UAT) schedule and Go-Live date for Release 1 in October 2020. In May 2020, PRMP decided to delay the PREE implementation date for Release 1 by six months from October 2020 to April 2021. This decision was to allow more time to design and implement the PREE Citizen Portal functionality and Change Requests (CR). PRMP noticed an increase in their online applications during the pandemic and decided to redirect their efforts towards the Citizen Portal JAD sessions and the development of the Citizen Portal Functional Design Document (FDD). Due to this, the review of the PREE Training Materials was put on hold by PRMP until a new project schedule was provided to reflect the new Go-Live date of April 2021. Due to the focus on Citizen Portal JAD sessions and PRMP utilizing the same SMEs for both the JADs and Training Materials review, PRMP leadership divided the SMEs working hours equally between the two efforts to avoid a delay in the project schedule. The review of the PREE Training Materials resumed on 06/15/20 and was delivered on time on 08/03/20.

3 IV&V Spanish Translation Support Details

This section provides an overview of the completed IV&V assessment for the overall Spanish Translation Support provided to PRMP.

3.1 Process and Support Overview

IV&V provided direct support in all review sessions of the PREE Training Materials. IV&V, the PMO, and V2A reviewed the Training Materials first to identify and correct translation errors. This allowed PRMP to focus their review on their business processes and how/if they were implemented into the system accurately.

RedMane submitted their PREE Training Materials in the three waves shown in Exhibit 3. Each wave contained different training information.

Exhibit 3: Training Materials

Wave	Training Documentation	Total
1	<ul style="list-style-type: none">• Surveys• Final Exams• PowerPoint Presentations	<ul style="list-style-type: none">• 3• 6• 9
2	<ul style="list-style-type: none">• Job Aids	<ul style="list-style-type: none">• 23
3	<ul style="list-style-type: none">• User Guides	<ul style="list-style-type: none">• 3

The original plan was for RedMane to submit the materials in English, have PRMP's SMEs review and comment for accuracy, and then provide the final approved English version to OPS for translation to Spanish. Once OPS completed the translations, the materials would then be submitted to PRMP for review of the Spanish translations.

IV&V was asked to assist in this effort and worked with the PMO and RedMane to develop a review process. PRMP assigned IV&V to guide the review efforts for all PREE Training Materials, since IV&V had the Spanish speaking resources to aid PRMP. RedMane unofficially submitted the first wave of Training Materials in Spanish on 03/23/20. IV&V continued to solidify the written review process, which was approved by PRMP on 03/31/20.

The review for the PREE Training Materials in Spanish officially started on 04/06/20. Due to the COVID-19 pandemic, the review of the Training Materials was completed remotely. IV&V facilitated all internal review sessions with PRMP, the PMO, and V2A. Reviewers evaluated the Training Materials for accuracy and processes approved during the JAD sessions, as well as the quality of the Spanish translation.

While conducting the review for PREE Training Materials in Spanish, reviewers noticed poor quality in the translation of the documents completed by OPS. IV&V and the PMO proposed that PRMP open an issue for the translation quality for Wave 1 and a risk for the unknown translation quality for Waves 2 and 3. The issue and risk were formally presented in the OCM/Training Status Meeting on 04/21/20, as follows:

- **Issue EE-IS00087:** *PREE Training Materials Review for Wave 1.* The PREE Training Materials Review for Wave 1 have shown the following issues:

- Poor quality of translation – Literal translation of the English language in the training materials, as well as syntaxes, made the Spanish translation difficult to understand and created confusion regarding what the sentence was trying to explain/say.
 - During the review of Wave 1 Case Worker Day 1 Presentation, approximately 90% of the review session time was spent addressing translation issues through the Comment Information Matrix (CIM) comments.
 - Minimum standard in translation quality required to review materials is not met. The Training Materials showed lack of proper Spanish syntaxes, grammatical errors, and inconsistency with PRMP terminology which was provided by PRMP before the formal review began.
- **Risk EE-RI00241:** *PREE Training Materials Review for Waves 2 and 3.* Concerns with the quality of PREE Training Materials Review for Waves 2 and 3 (based on Wave 1 Training Materials Spanish translation) poses a risk to the Release 1 PREE Training completion. If current concerns are not addressed, these may impact the ability of PRMP reviewers to complete review of explanation/training of new processes in the Training Materials within the allotted 10-5-5 review process cycle.

The following concerns need to be addressed on Waves 2 and 3 Training Materials to avoid impacting the Training Materials review cycle:

- Poor quality of translation – Literal translation of the English language in the training materials, as well as syntaxes.
- Ensure that information mentioned in approved FDDs are accurately reflected in Waves 2 and 3 Training Materials (including images, screenshots, tables).

PRMP decided to cease their review of Wave 1 Training Materials until RedMane provided a mitigation plan for the above issue and risk. RedMane provided their response for these items on 04/22/20. Their response was approved by PRMP on the same date. The PREE Spanish Training Materials review process was updated as follows:

- PRMP reviewers were asked to stop reviewing all Training Materials that were currently under review, as PRMP was not reviewing the latest corrected versions.
- OPS delivered the updated versions, based on the PRMP's Table of Terms provided by IV&V on 04/20/20. This was the official list approved by the PRMP Director.
- The review sessions were to include OPS in the meetings. This was to allow concerns, clarifications, and mutual understanding with all parties to be addressed at once. It was expected that both the Spanish language translation and the Training Material content would be reviewed in these joint meetings facilitated by IV&V and the PMO.
- Training Materials were to be updated during the review session with track changes. This meant that CIM documents would not be utilized, since comments would be addressed real-time.

Review of the PREE Training Materials Spanish translations resumed on 06/15/20 for Waves 1, 2, and 3 and was scheduled to be completed on 08/03/20. PRMP worked in parallel with the PMO, IV&V, and V2A to review and update the Training Materials. Pulse Meetings took place every week with the entire Review Committee including PRMP, the PMO, V2A, and IV&V. These meetings were to consolidate all major comments and concerns to be discussed with RedMane and OPS during a separate weekly meeting. All major comments and/or concerns were resolved with RedMane and OPS during the

scheduled weekly meetings. IV&V was directly involved in the review process of these Training Materials and continued to document the process related to the on-time delivery.

Training Materials for Citizen Portal and Appeals were added to the review cycle for Waves 2 and 3. IV&V did not identify any issues or concerns with combining these Training Materials under the same review cycle, since PRMP was ahead of schedule on their review process.

The review for the Training Materials for Waves 1, 2, and 3 was completed on schedule, 08/03/20. Documents were returned to RedMane in a staggered approach to review all changes made by the vendors and PRMP. This approach allowed for a streamlined review process and provided resolution of comments that would allow RedMane to submit a final version of each document for timely approval. PRMP provided final approval of all PREE Training Materials for Waves 1, 2, and 3 on 08/25/20.

3.2 PREE Training Plan

NTT DATA reviewed the PREE Training Plan to ensure the proper approach to the development and maintenance of required training materials and aids. The Training Plan was a deliverable submitted by V2A; however, per PRMP's decision, V2A's deliverables were not required to go through the formal deliverable review process. However, IV&V completed a review of the following areas, and no major issues or comments were identified.

- Identification of curricula
- Effective use of classroom and hands-on training modes
- Reasonable trainer-trainee ratios
- Review of the training schedule developed, which supports systems implementation
- Training to be provided for trainers and users

As of 09/18/20, the following four Action Items (AI) related to the Training Plan were still outstanding and overdue:

- **EE-AI00909** (*Training Facilities - Pending Items*): A gap was identified that the training facilities may not have enough electrical outlets for the computers for training. A possible solution was to order extension cords and surge protectors. PRMP must decide if this solution is acceptable, and if so, order these items for training. There is a pending status for OIAT's recommendation for a phone, that requires a response.
- **EE-AI00983** (*PREE Training Logistics Coordination*): PRMP to reserve conference rooms, schedule training sessions, print training materials, send training invites and complete all the logistics preparations for conducting training sessions at least two weeks prior to start of the training sessions.
- **EE-AI00984** (*Update the Training and Knowledge Transfer Plan*): RedMane to update Training and Knowledge Transfer Plan with the approved I.4.2.k.ii - Completed Security and Organization FDD. The roles and responsibilities for Functional Help Desk Staff should be validated.
- **EE-AI00985** (*Status of Computers for Training*): Computers for training have been ordered and have arrived. However, they have not been sent and set up in the training facilities. This is tied to EE-AI00909.

IV&V constantly made observations related to the Training facilities not meeting basic necessities, especially with the COVID-19 pandemic, availability, and end users inability to work from local offices. IV&V will continue to monitor the resolution of these action items until 09/30/20.

3.3 Training Material Review Sessions

NTT DATA, through interaction and collaboration with all PREE Project training staff, reviewed draft Training Materials, providing continual feedback through their acceptance. IV&V evaluated that the materials were useful to the end users on a day-to-day basis and would help provide answers to questions immediately without having to call the Help Desk. IV&V also verified that PREE training requirements were met. Examples include the following:

- Instructor guides provided a level of detail and clarity to ensure that all the system functions and features will be explained and demonstrated.
- Trainees will understand the objectives of the system and its various modules.
- The system and screen navigation techniques are clearly detailed in the Job Aids.
- The system start-up and shutdown functions as described in the User Guides and Job Aids.
- Menus and directory usage are well defined and understandable.
- Data elements and screen meanings are easily understood.
- Help is easily accessible by the users through the Technical Help Desk.
- Materials reflect all required changes to text and modifications to the system. A Table of Terms was created and approved by the PRMP Medicaid Director to make sure all the terms reflected in the system were compatible with PRMP terminology.
- The materials provide suggested remedies for problem resolution.

3.4 Training Site Visits

Since all Medicaid offices were closed due to the COVID-19 pandemic, the training site(s) could not be visited and evaluated by IV&V for adequacy and readiness prior to the start of any training.

3.5 Process Observations

Throughout the review process of the PREE Training Materials Spanish Translations, IV&V made constant observations based on possible risk, issues, and project schedule delays. These observations were documented in the IV&V Weekly Status Reports (WSR) and Monthly Assessment Reports (MAR) provided to all Project stakeholders. Exhibit 4 illustrates key observations made by IV&V on the Training Materials review.

Exhibit 4: IV&V Observations

#	Observation
1	The COVID-19 pandemic put the project schedule at risk, including the review of the PREE Training Materials. PRMP had to provide technological support to their employees for them to be able to continue the review from home.
2	PRMP noticed an increase of online applications through their website during the pandemic and decided to redirect their efforts towards the Citizen Portal JAD sessions and the development of the Citizen Portal FDD, which put the review of the training materials on hold.
3	The PREE Training Materials Spanish Translation were of low quality when first submitted by RedMane and OPS. The training materials showed lack of proper Spanish syntax, grammatical errors and inconsistency with PRMP terminology. This terminology was provided to OPS prior to the start of the training material translations PRMP asked that OPS resubmit their translations of all PREE Training Materials before continuing with the formal review.
4	For future translations of PREE documentation, a company specialized in translation should be contracted by PRMP or RedMane.
5	The review of the PREE Training Materials was put on hold for the entire month of May 2020, while waiting on an official decision by PRMP to move the Release 1 Go-Live date from October 2020.
6	There was a lack of PRMP resources for the review of the PREE Training Materials. The same resources were also assigned to the Citizen Portal JAD sessions.
7	The PRMP Review Committee asked to be a part of UAT since they were the team involved in the design and development of the End-User Training Materials for PREE.
8	The PRMP Review Committee was also assigned to review the Citizen Portal FDD and Training Materials, which delayed the review process of the PREE Training Materials Spanish Translation.
9	RedMane's resource for the review of PREE Training Materials was on leave for two weeks. This slowed the review process and made it difficult to provide accurate information needed by PRMP during their review process. Even though RedMane provided temporary resources to answer outstanding questions, not all comments and concerns were addressed in a timely matter.
10	During the Weekly Pulse Meeting on 07/23/20, PRMP reviewers reviewed comments and concerns made to the Auxiliary Clerk User Guide (training item included in Wave 3 of Training Materials) and decided to reject this training item given the significant amount of copy-paste from the Caseworker User Guide. This made it difficult to clearly identify the responsibilities of an auxiliary clerk vs a caseworker. PRMP requested this deliverable be resubmitted after revisions were made.

3.5.1 Risk Analysis

IV&V identified and documented the enterprise Risks listed in . All risks were tracked and monitored through resolution.

Exhibit 5: Active Risks or Risks Updated in This Period

Risk Log ID	Risk Status	Risk Description	Risk Category	IV&V Analysis
IV&V 37	Closed	If the limited PRMP resources and SMEs are needed for UAT, R2 JADs and Training at the same time, then the likelihood of resource constraints will be magnified.	Resource Management	Closed. PRMP identified an Organizational Change Management (OCM) Manager with the selected OCM Vendor, V2A. The PMO will support the role of UAT Test Manager for UAT.
IV&V 40	Active	If RedMane submits the entire set of 41 training and user guide deliverables for the PREE system at one time, then the PRMP resources will not be able to review and provide valuable feedback for the materials on a timely basis.	Resource Management	Closed. PRMP resources have been assigned for the review of the Training Materials.
IV&V 44	Active	If the same key resources from the PRMP operations staff are needed in both the Training Materials review sessions and Citizen Portal JAD sessions, then the project schedule may be negatively impacted.	Resource Management	Closed. PRMP resources were able to assist Citizen Portal JADs while continuing their review of the PREE Training Materials.

3.5.2 Associated Issues Analysis

The issue listed in Exhibit 6 were documented by the PMO on the projects issue log in SharePoint and was tracked by IV&V until resolution.

Exhibit 6: Active IV&V Issues

Issue Log ID	Issue Status	Issue Description	IV&V Analysis
EE-IS00087	Resolved	The PREE Training Materials Review for Wave 1 have shown the following issues: <ul style="list-style-type: none"> Poor quality of translation – Literal translation of English training presentation language as well as syntax makes Spanish translation difficult to understand and creates confusion regarding what the sentence is trying to explain / say. 	Closed. IV&V recommended resuming the review cycle for the Wave 1 training materials after the training materials were updated to address all translation issues noted in issue description.

Issue Log ID	Issue Status	Issue Description	IV&V Analysis
		<ul style="list-style-type: none"> During the Review of Wave 1 Case Worker Day 1 Presentation, approximately 90% of the review session time was spent addressing translation issues through CIM comments. Minimum standard in translation quality required to review materials is not met. 	

3.6 Resource Assessment

All vendors and stakeholders involved in the Training Workstream were crucial to the review of the PREE Training Materials Spanish Translation. This combined effort was key to the success of the review process and final approval of the Training documents. The vendors involved in the development, translation, review, and approval of the PREE Training Materials include:

- PRMP's SMEs – (PREE Client) – PRMP's SMEs are end-user Medicaid employees that were selected to participate in JAD sessions at the beginning of the design, development and implementation (DDI) phase. These SMEs were responsible for reviewing all of the PREE Training Materials, focusing mainly on the business process of the PREE system, since they had the knowledge of the system's rules and design gathered from JAD sessions. PRMP's SMEs also created the Table of Terms for Medicaid Terminology that would be used in the PREE System (Spanish version) and PREE Training Materials for consistency purposes. PRMP's SMEs attended multiple weekly OCM/Training meetings where they provided their comments and concerns related to the PREE Training Materials based on the functionality of the system and received answers and resolutions from all vendors involved in the review process.
- Intervoice (PMO Vendor): PMO coordinated all review sessions between PRMP, IV&V, the PMO and V2A. They also maintained the Deliverable Log in the DDI PREE SharePoint with the latest versions and updated comments. The PMO documented all PRMP's questions and concerns to later be discussed in internal meetings with RedMane and OPS. The PMO also provided status updates of the PREE Training Materials Spanish Translation review during OCM/Training Weekly Status Meetings.
- V2A (OCM/Training Vendor) - Reviewed Training Materials to ensure that the quality of the documents met PREE Training expectations.
- RedMane (System Integrator) - Developed the PREE Training Materials and delivered them to the Project using the formal deliverable process. Answered all questions and concerns made by the Review Committee based on the system processes.
- OPS (Translation Vendor) – Responsible for translating all Training Materials from English to Spanish. Answered all questions and concerns regarding translation discrepancies.
- NTT DATA (IV&V Vendor) – Responsible for reviewing all PREE Training Materials to identify, track, and manage discrepancies in the Spanish Translations and system processes. Provided Spanish speaking resources to facilitate review sessions with PRMP, the PMO, and V2A to ensure the quality of the documents met PREE Training expectations. Provided status of the Training Materials review

process in internal meetings with vendors and stakeholders. Submitted weekly and monthly assessments to the client and stakeholders with all the information related to the PREE Training Materials review process.

IV&V tracked PRMP's progress throughout the review to make sure that the lack of resources did not affect the quality and accuracy of the review of the Training Materials. PRMP managed their time and resources effectively, proactively, and managed to keep the review ahead of schedule.

3.7 Schedule Assessment

Even after combining efforts with the various vendors to keep the schedule on track, some issues were unpredictable, such as the COVID-19 pandemic. The following list identifies the delays IV&V documented during the review of the PREE Training Materials Spanish Translation process. Although these delays were encountered, they did not prevent the due date of 08/03/20 from being achieved.

- The COVID-19 pandemic threatened the PREE Training Materials review schedule. PRMP's SMEs did not have the authority nor the technology to perform their review from home. After PRMP provided remote work protocols, internet and computers to their employees, the review schedule continued with its original due date.
- The original implementation date of October 2020 was first impacted when PRMP made the decision to return all PREE Training Materials to RedMane and OPS for revisions. RedMane managed to provide a new project schedule to accommodate the new review cycle for the PREE Training Materials; however, the UAT Testing schedule was impacted.
- During May 2020, PRMP decided to delay the implementation date of Release 1 from October 2020 to April 2021. PRMP put the review of the PREE Training Materials on hold until a new project schedule was submitted to reflect the new Go-Live date.
- The Citizen Portal JAD sessions also posed a delay in the review process of the PREE Training Materials, since PRMP used the same SMEs in both workstreams. PRMP leadership divided the SME's working hours equally between Citizen Portal JAD sessions and the PREE Training Materials review to avoid a delay in the project schedule.

IV&V was diligent in assessing possible delays in the project schedule during the review process of the PREE Training Materials. In a combined effort with other project vendors, the workstream stakeholders managed to redistribute the workload and provide all possible solutions to successfully avoid any delays. All PREE Training Materials were delivered and approved timely by PRMP.

3.8 Deliverable Assessment

Exhibit 7: Deliverable Assessment Summaries provides a summary of all PREE Training Material deliverables submitted and reviewed by IV&V. The exhibit documents the deliverable name, status, and total IV&V comments submitted for each.

In total, IV&V reviewed 44 training documents and submitted comments on 43 of them.

Puerto Rico Department of Health

PREE DDI Phase

IV&V Spanish Translation Support Report – September 30, 2020



Exhibit 7: Deliverable Assessment Summaries

#	Deliverable Name	Deliverable Status	Comment Count
1	PPT: Caseworker Day 1	Approved	29*
2	PPT: Caseworker Day 2	Approved	31*
3	PPT: Caseworker Day 3	Approved	20*
4	PPT: Caseworker Day 4	Approved	21*
5	PPT: Caseworker Day 5	Approved	20*
6	PPT: Auxiliary Clerk Day 1	Approved	38*
7	PPT: Auxiliary Clerk Day 2	Approved	18*
8	PPT: Fraud – Navigation (1)	Approved	57*
9	PPT: Call Center (1)	Approved	49*
10	Final Exam: Caseworker	Approved	5*
11	Final Exam: Appeals	Approved	7*
12	Final Exam: Auxiliary Clerk	Approved	11*
13	Final Exam: Call Center	Approved	5
14	Final Exam: Fraud	Approved	15*
15	Final Exam: Supervisor	Approved	6*
16	Survey: End User Training	Approved	4*
17	Survey: Train the Trainer Assessment	Approved	5*
18	Survey: TTT Survey	Approved	6*
19	Job Aid: Adding or Removing Household Members	Approved	12
20	Job Aid: Address Change	Approved	5
21	Job Aid: Call Center	Approved	13
22	Job Aid: Converted Case	Approved	17
23	Job Aid: Closing a Product Delivery Case	Approved	9
24	Job Aid: Creating a Case Note	Approved	6
25	Job Aid: Generating a Notice	Approved	11
26	Job Aid: Income Changes	Approved	0
27	Job Aid: Managing Duplicate Person	Approved	7
28	Job Aid: Managing Interviews	Approved	9
29	Job Aid: Managing Tasks, Work Queues and Notifications	Approved	4
30	Job Aid: Managing Work for Users	Approved	6
31	Job Aid: Pregnancy	Approved	3
32	Job Aid: Processing a Change of Circumstances	Approved	6
33	Job Aid: Processing Applications	Approved	4

#	Deliverable Name	Deliverable Status	Comment Count
34	Job Aid: Processing Renewals	Approved	6
35	Job Aid: Processing TBQ Tasks	Approved	6
36	Job Aid: Registering a Person	Approved	7
37	Job Aid: Registering an Employer	Approved	6
38	Job Aid: Retroactive Medicaid	Approved	8
39	Job Aid: Submitting an Application	Approved	16
40	Job Aid: System Overview	Approved	15
41	Job Aid: Working with Evidence	Approved	13
42	User Guide: Auxiliary Clerk	Approved	17
43	User Guide: Caseworker	Approved	24
44	User Guide: Supervisor	Approved	14

*The total number of comments combined made by PMO, IV&V, V2A, and PRMP. These comments were combined since they targeted the same issues inside the documents.

4 IV&V Recommendations

This section documents IV&V's suggested recommendations as a result of IV&V observing meetings or calls to discuss the PREE Training Material review. Exhibit 8 lists the IV&V team's recommendations, which resulted from observing meetings or conference calls to discuss the PREE Project status and progress. All recommendations were implemented by PRMP or Stakeholders.



These recommendations were presented to PRMP, RedMane and/or Intervoice teams as a best practice or value add to the PREE Project success.

Exhibit 8: PRMP PREE Project – IV&V Team Recommendations

Date	Source	Recommendation
04/30/20	MAR	Based on the poor quality of the translation of the PREE Training Materials, IV&V recommended PRMP to reject all of the training materials and to ask RedMane and OPS to re-submit their translations of the materials for all three Waves before PRMP continued with their review.
06/30/20	WSR	IV&V recommended to add all the Citizen Portal and Appeals Training Materials to the review cycle of the PREE Training Materials due on 08/03/20 since the PRMP Review Committee was ahead of schedule in their review and they confirmed to have the availability to complete both reviews on time.
07/31/20	WSR	During the Weekly Pulse Meeting on 07/23/20, PRMP Reviewers reviewed comments and concerns made to the Auxiliary Clerk User Guide (training item included in Wave 3 of Training Materials) and it was recommended to reject this training item 'given the significant amount of copy-paste from the Caseworker User Guide making it difficult to clearly identify the responsibilities of an auxiliary clerk vs a caseworker'. They requested that this deliverable be resubmitted to PRMP once this has been appropriately addressed and fixed in the Auxiliary User Guide by RedMane and OPS.

Appendix A. Acronyms

This appendix defines the acronyms used in this report. It also includes acronyms that are anticipated to be used in future reports. The list will be adjusted as the project progresses.

Acronym	Definition
CIM	Comment Information Matrix
CMS	Centers for Medicare and Medicaid Services
CR	Change Request
E&E	Eligibility and Enrollment
FDD	Functional Design Document
IV&V	Independent Verification and Validation
JAD	Joint Application Development
JIRA	Tracking tool developed by Australian Company Atlassian. It is used for bug tracking, issue tracking, and project management. Not an acronym.
KSC	Key Stakeholder Committee
OCM	Organizational Change Management
OOTB	Out-of-the-Box
PMO	Project Management Office
PRDoH	Puerto Rico Department of Health Services
PREE	Puerto Rico Eligibility and Enrollment
PRMP	Puerto Rico Medicaid Program Office
RAID	Risk, Action Item and Decision
RFQ	Request for Quote
SME	Subject Matter Expert
SOW	Statement of Work
SI	System Integrator
SIT	System Integration Testing
UAT	User Acceptance Testing
WSR	Weekly Status Report